

OCLC Connexion Client Cataloging Quick Reference

Introduction

The Connexion client is a Windows-based interface to OCLC Connexion® used to access WorldCat for cataloging.

This quick reference provides brief instructions for editing, saving, exporting, and printing labels for bibliographic records; using local files; creating and adding records to WorldCat; replacing master records; batch processing; and cataloging with non-Latin scripts.

Multiscript support: The client supports the following non-Latin scripts: Arabic, Bengali, Chinese, Cyrillic, Devanagari, Greek, Hebrew, Japanese, Korean, Tamil, and Thai.



This quick reference **does not cover** instructions for authorities work or instructions already available in:

- [Getting Started with Connexion Client](#)
- [Connexion Client Setup Worksheet](#)
- [Connexion: Searching WorldCat Quick Reference](#)

Connexion client documentation assumes knowledge of MARC cataloging.

Open the Connexion client and log on

Open the Search WorldCat client window or browser screen:

	Action
1	Click Windows Start > Programs > OCLC Connexion , or click the client icon on the desktop: 
2	Click File > Logon , or click  , or press <Ctrl><F1>.
3	Enter your OCLC authorization and password, and click OK or press <Enter>.

Connexion client commands and statuses

Menus/commands


- To use client functions, click a menu name at the top of the client window, and then click a command.
Or
Use equivalent keystroke shortcuts or toolbar buttons (displayed with the command names).
- The client installs with pre-set (“default”) keystrokes and a default set of toolbar buttons on the main client toolbar

Keystroke shortcuts

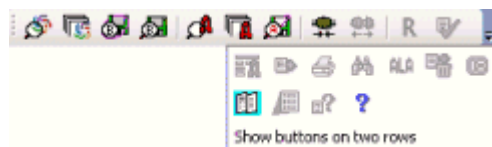
- Use default keystroke shortcuts or assign your own to activate commands, insert characters, run macros, and insert text strings.
- View key assignments in **View > Assigned Keys**. To print or copy the list, click **Print** or **Copy to Clipboard**.
Tip: Before printing, click a column heading to sort the list by data in the column.
- Assign your own keystrokes in **Tools > Keymaps**.
- Print a function key template to put at the top of your keyboard: www.oclc.org/support/documentation/connexion/client/gettingstarted/keyboardtemplate.pdf.

Toolbar

- The client installs with three toolbars displayed by default:
 - Main client toolbar (with command-equivalent buttons)
 - WorldCat quick search tool
 - Quick tools for text strings and user tools
- Customize the main client toolbar: In **Tools > Toolbar Editor**, drag and drop buttons to add or remove, or reset to the default.
- Reposition toolbar buttons in the toolbar: Hold down <Alt> and drag and drop a button to a new position.
- Re-position toolbars: Move a toolbar to the right, left, top, or bottom of the client window by dragging and dropping it by its

dotted “handle” ()

- Show or hide toolbars: Click **View > Toolbars**.
- Show toolbar on one line or two: Click the arrow at the right end of the toolbar, and then click **Show buttons on one row** (default) or **Show buttons on two rows**:



Status bar

- Located at the bottom of the client window, the status bar shows:
 - For records: Actions and outcomes; source of record; workflow status; My Status; record number of the total in a list; edit mode; session timing if logged on.
 - For lists: Record number of the total in the list for a selected entry.
- Statuses are retained only for online or local save file records.
- To show or hide the status bar, click **View > Status Bar**.

Selected default keystrokes and default toolbar buttons

The following list shows only buttons that are on the default toolbar. Three asterisks (***) indicate buttons not on the default toolbar. Add or remove buttons using drag and drop in **Tools > Toolbar Editor**.

Client menu > command	Keystroke	Toolbar button***
File > Logon	<Ctrl><F1>	
File > Logoff	<Alt><F1>	
File > Print	<Ctrl><P>	
File > Print List	<Shift><F12>	***
File > Print Label(s)	<Shift><F10>	***
File > Exit	<Alt><F4>	***
Cataloging > Search > WorldCat	<F2>	
Cataloging > Search > Online Save File	<Ctrl><F3>	
Cataloging > Search > Local Save File	<F3>	
Cataloging > Browse > WorldCat	<Ctrl><F2>	
Authorities > Search > LC Names and Subjects	<Shift><F2>	
Authorities > Search > Online Save File	<Alt><F3>	
Authorities > Search > Local Save File	<Shift><F3>	***
Authorities > Browse > LC Names and Subjects	<Alt><F2>	
Edit > Validate	<Shift><F5>	
Edit > Control Headings > All	<Shift><F11>	***
Edit > Control Headings > Single	<F11>	
Edit > Control Headings > Uncontrol Single	<Ctrl><F11>	***
Edit > Cut Copy Paste > Cut	<Ctrl><X>	
Edit > Cut Copy Paste > Copy	<Ctrl><C>	
Edit > Cut Copy Paste > Paste	<Ctrl><V>	
Edit > Find/Replace	<Ctrl><F>	
Edit > Enter Diacritics	<Ctrl><E>	
Edit > Reformat	<Ctrl><R>	
Action > Holdings > Update Holdings	<F8>	
Action > Holdings > Produce & Update Holdings	<Shift><F7>	
Action > Holdings > Delete Holdings	<Shift><F8>	
Action > Lock Master Record	<Alt><F8>	***
Action > Release Record Lock	<Alt><F9>	***
Action > Replace Record	<Alt><F10>	***

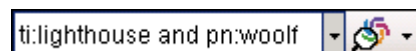
Client menu > command	Keystroke	Toolbar button***
Action > Replace & Update Holdings	<Alt><F11>	***
Action > Save to Local File	<F4>	***
Action > Delete Record	<Ctrl><Alt><D>	
Action > Export	<F5>	
View > Navigate Records and Lists > Back	<Shift><F9>	
View > Navigate Records and Lists > Forward	<F9>	
View > Label	<F10>	
View > News	<Ctrl><F5>	
View > Pinned	<Shift><F4>	***
Tools > Check Spelling	<F7>	***
Help > Client Help	<F1>	
Help > MARC Field Help	<Ctrl><F1>	

Search for WorldCat records

Search WorldCat to find records to use for cataloging.

Use WorldCat quick search on the toolbar

Use the quick search alternative to opening the Search WorldCat window. Enter a command line search or browse, as shown, and click the search WorldCat icon to send the search.



Use WorldCat search and browse windows




Click **Cataloging > Search > WorldCat** (or <F2>). Then:

- Enter a command line search in the **Command Line** area: Type a complete **keyword, numeric, or derived search or browse** (index scan). Use full search syntax, a single string with index labels, punctuation, search terms, Boolean operators, and qualifiers in correct order.
Or
- Enter a guided search in the **Keyword/Numeric** area: Type or select the parts of a **keyword, numeric, or derived search** using text boxes and lists.

Or

Click **Cataloging > Browse > WorldCat** (or <Ctrl><F2>) to enter a guided browse (index scan) using text boxes and lists.

Use features of the Search WorldCat window

Feature	How to use
Retain Search	Select check box to keep the last search term(s).
Search for	Enter a search in the text box or click the down arrow to select from up to 10 previous searches.
 and 	Click to toggle between displaying short or full index, language, or material type lists.
	Click to customize the short index or material type list.
Enter Diacritics	Click to insert valid diacritics and special characters by selecting an image or name.
Clear Search	Click to collapse the Search window to show only the command line or to return to the full window.
Settings	Click to select the way you want search results to display.

WorldCat search and browse results

Search: The default display of search results is based on the number of records retrieved (or you can change how the results display):

Number of records	Client displays
1	Full record.
2 to 5	Brief list: Two-line description of each record.
6 to 100	Truncated list: One-line description, sorted by data in the index you searched.
101 to 1,500	Group list: Entries represent groups of records sorted by MARC format and year of publication.
Over 1,500	Error message: <i>Too many records retrieved. Edit or limit search and try again.</i>

Browse: Browsing produces a list of terms that match or closely match your browse term. The match or closest match is highlighted.

Open a record from a list

To open a record or another list from a results list, double-click an entry, or highlight an entry and press <Enter>.

Right-click shortcut menu for lists

Right-click in a list. On the popup menu, use the following commands:

Command	Use to ...
Copy	Copy selected entries in the current list.
Select All	Select all list entries (unavailable in a browse list)
List Settings	Open a window to customize the way the list displays: <ul style="list-style-type: none"> Select or eliminate columns from displaying Move columns to re-order the list Reset the list display to the original
Reset List Size	Reset column sizes to original (see the following tips)

Tips for customizing a list display

To resize columns: Click, hold, and drag the vertical corner of a column.



To re-sort a list by a column: Click the heading of the column. The client re-sorts the list immediately by the data in the column.

Edit records

About record limits:


- No limits on the number of variable fields or total record length.
- Theoretical limit on the number of characters: Up to 99,999.

View and navigate records

To do this ...	Use these commands or steps ...
Move through three record areas: record information area, fixed field area, and variable field area.	Edit > Next Record Area (or <F6>). Or Edit > Previous Record Area (or <Shift><F6>).
Show or hide drop-down lists of selectable values for fixed field elements.	Default: The client has drop-down lists of valid values for each element. Or, as an option: Hide the lists using Tools > Options > Record Display ; click to clear the Use dropdowns... check box.
When you open a record from a list, open the next or previous record without returning to the list.	View > Navigate Records and Lists > Forward (or use  or <F9>). Or View > Navigate Records and Lists > Back (or use  or <Shift><F9>)
"Pin" records open. Records you open from different databases and files are treated as different types (for example, bibliographic save file records and WorldCat records are different types). Different types stay open simultaneously. Opening a second record of the same type closes the first.	View > Pinned (<Shift><F4>) Use before opening another record to keep records of the same type open simultaneously.


Open MARC field descriptions

To open a Web page description in **OC LC Bibliographic Formats and Standards** for a field or fixed field element:

Action
Place the cursor in a variable field or a fixed field element, and click Help > MARC Field Help (or use  or <Ctrl><F1>).
Note: This command is also on the right-click menu.

Insert diacritics

Enter Latin script diacritics and special characters included in a standard set of valid characters adopted by the American Library Association (ALA).

	Action
1	In a record: Place the cursor where you want to insert, and click Edit > Enter Diacritics (or use  or <Ctrl><E>). Or In a search term or a "find" or "replace" term: Click Enter Diacritics in a Search, Browse, or Find/Replace window. Or In a label: View a label for the displayed record (View > Label), and click ALA Entry .
2	In the Enter Diacritics and Special Characters window, select a character from the chart of images or from the list of names.

Notes:

- Insert a diacritic after the letter it modifies.
- Optionally, use default assigned keystrokes to insert characters. Click **View > Assigned Keys** for a complete list.
- See instructions in [Getting Started](#) for installing and using the RLIN21 Latin keyboard for inserting diacritics and characters.

Create and use constant data

Create and apply MARC-formatted constant data to add standard content to bibliographic records without having to re-key.


	Action
1	Create a constant data record: Click Cataloging > Create > Constant Data (<Ctrl><Shift><N>) and select a MARC format.
2	After you edit or add data to the new constant data record, save it: Click Action > Save Record to Online File (<Ctrl><Alt><V>) (must be logged on) or Save Record to Local File (<F4>), and then: <ul style="list-style-type: none"> • Required. Assign a name to the constant data record. • Optional. Click the check box to set the new constant data record as the default, if you use it often. • Optional. Add a free-text My Status to help retrieve the record (see Tip in "Save records" below for instructions).
3	Apply default constant data: With a bibliographic record open: Click Edit > Constant Data > Online > Apply Default (<Ctrl><A>) (must be logged on). Or Click Edit > Constant Data > Local > Apply Default (<Ctrl><Y>).

If you use multiple constant data records, you can also:

- Apply constant data by record name (**Edit > Constant Data > Online [or Local] > Apply by Name**).
Or
- Select and apply from a list of constant data records (**Edit > Constant Data > Online [or Local] > Apply from List**).

Create and use text strings

Create and insert often used data that is short—for example, a partial MARC field—into records (supplements constant data).


	Action
1	Click Tools > Text Strings , or in the text strings quick tool on the toolbar,  , click the name and icon, or click the arrow and then click Manage .
2	Create a text string: In the Text Strings window, click Add . <ul style="list-style-type: none"> • Enter a unique name ("description") • Enter a string of text to insert in: <ul style="list-style-type: none"> ○ A data cell in a field ○ A complete field (enter with no spaces between tag, indicators, and data) ○ Multiple fields (enter each field on a separate line)
3	To work with an existing text string, select a text string in the list and click Modify , Delete , Keymaps (to assign a text string to a keystroke), or User Tools (to assign to a generic toolbar button). To print the entire list of text strings, click Print .
4	Insert a text string: Place the cursor in a record where you want to insert a text string, and then: <ol style="list-style-type: none"> 1. Click Tools > Text Strings. 2. Select a text string and click Apply.

Validate records

Automatic validation. When you take a final action interactively or via batch, the system automatically validates the record, **except**, by default, when you export or set holdings on existing records. Change an option to validate records for these two actions in **Tools > Options > General**; click **Validation Level Options**. Select one:


- **Structure** (minimal validation for set holdings actions) or **None** (no validation for export) (**default**)
- **Basic** (verifies MARC record structure, including elements, length, repeatability, type of data and codes)
- **Full** (basic validation and verifies relationships among elements).

To validate records separately before taking actions on records:

Action
With a WorldCat record or local or online save file record open, or with records selected in a list, while logged on or offline: Click Edit > Validate (or use  or <Shift><F5>).

Control headings in bibliographic records

Control a name heading in a bibliographic record. When you control a heading, you retrieve a matching authority record and insert the heading in the bibliographic record as a link. The system automatically maintains future changes to the heading.

Action
<p>Display a record and click Edit > Control Headings. Then click to select:</p> <ul style="list-style-type: none"> • *Single (or use  or <F11>) (controls heading of field where cursor is located if exact match is found) • All (Shift<F11>) (controls all headings if matches are found) • *Uncontrol Single (<Ctrl><F11>) (uncontrols heading in field where cursor is located; must uncontrol to edit text) • Uncontrol All (uncontrols all headings) <p>*Note: These two commands are also on the right-click menu.</p>

Controllable fields

- 100, 110, 111, 130
- 600, 610, 611, 630, 650, 651, with second indicators of 0 or 4
- 700, 710, 711, 730
- 800, 810, 811, 830

Notes on results
<p>Control Single: If no match is found, the Control Heading screen opens. Use it to control the heading manually. You must use Control Single for personal name headings containing ‡a only.</p>
<p>Control All: If some headings are not controlled, control each singly.</p>
<p>Hyperlink: Controlled headings are hyperlinked to the controlling authority record(s). Click the link to open authority record.</p>
<p>Replace: You must replace a record to retain the controlled heading(s) in the WorldCat master record (Action > Replace Record or Action > Replace and Update Holdings). The system locks the record automatically before replacing it.</p> <p>Minimum logon authorization for replacing master records:</p> <ul style="list-style-type: none"> • Full or higher to replace the record if the text of the heading is not changed. • Higher than Full to replace the record if controlling heading(s) changes the text. • Limited: You cannot replace the master record, but you can save the record for local use.
<p>If the heading changes in the system later: OCLCA is automatically added in field 040 ‡d.</p>

Insert data from related records (fields 760 – 787)

Build a field in the 760 to 787 range and automatically insert data from a bibliographically related (cited) record:

Action	
1	Add a blank field to a record and enter one of the following tags: 760, 762, 765, 767, 770, 772, 773, 774, 775, 776, 777, 780, 785, 786, or 787
2	Enter appropriate indicators. Then enter the OCLC number (with or without the pound sign, #) for the related record to cite.
3	<p>Click Edit > Insert from Cited Record (<Alt><E><I>).</p> <p>Note: This command is also on the right-click menu for records.</p> <p>Example: Create a new field and enter tag 780, indicators 0 0, and OCLC number 11553638. The client puts the OCLC number in ‡w and enters the data from record 11553638. The field looks like this:</p> <p>780 0 0 Episcopal Church. Diocese of Southern Ohio. ‡t Journal of the ... annual convention #w (OCoLC)11553638</p>

Right-click shortcut menu for records

Right-click in a record and use any of the following commands. All commands are also on client menus except one, indicated by an asterisk (*).

Undo	Uncontrol Single
Cut	Transliterate > Arabic [or Persian]
Copy	Right-to-Left Reading Order
Paste	Insert from Cited Record
Paste Unformatted	Edit with Guided Entry
Delete Field	*Insert Unicode Control Characters > [Select a character] (available only on right-click menu)
Copy Field	Link Fields
Copy Control Number	Unlink Fields
Control Single Heading	MARC Field Help

Default keystroke shortcuts for editing and navigating in records

Some of the most used editing commands and shortcut keystrokes are shown in the table on page 2. The table on the following page shows more default shortcuts. In the table:

- "Current" means at the cursor location or in the editing focus.
- Equivalent menu commands are shown, if they exist.
- Asterisks next to commands indicate that the commands are also on the right-click popup menu.

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More keystroke shortcuts for editing and navigating in records		
Use the keyboard shortcut or ...	Use equivalent Edit > Cut Copy Paste menu command ...	To do this ...
<Alt><E><O>	*Copy as Text	Copy selected content as plain text (ASCII format).
<Alt><E><S>	* Paste Unformatted	Paste content from a Web page as a single block.
<Ctrl><Z>	* Undo	Undo the last edit.
<Ctrl><Shift><Z>	Cancel Changes	Cancel all edits since the last save.
<Alt><Delete>	* Delete Field	Delete current field.
<Alt><Insert>	* Copy Field	Copy current field.
<Alt><Up arrow> And <Alt><Down arrow>	Move Field > Up [or Down]	Move current field up or down one position. In fixed field with drop-down lists displayed: Display current drop-down list so you can use arrow keys to scroll up or down.
<Enter> And <Shift><Enter>	Insert Blank Field > Above Current Field [or Below Current Field]	Insert blank field above or below current field.
<Ctrl><T>	* Copy Control Number	Copy OCLC number.
<Up arrow> And <Down arrow>	None	Move cursor to same position in line above or line below. In fixed field with drop-down lists displayed: Move cursor up or down in list of values for current element.
<Shift><Up arrow> And <Shift><Down arrow>	None	In fixed field: Move cursor up or down to the fixed field element immediately above or below.
<Alt><Up arrow> And <Alt><Down arrow>	None	Move the current field up or down one position. In fixed field with drop-down lists displayed: Display the current drop-down list so that you can use arrow keys to scroll.
<Ctrl><Up arrow> And <Ctrl><Down arrow>	None	Move scroll bar up or down one line.
<Right arrow> And <Left arrow>	None	Move cursor to right or left one character.

More keystroke shortcuts for editing and navigating in records		
Use the keyboard shortcut or ...	Use equivalent Edit > Cut Copy Paste menu command ...	To do this ...
<Ctrl><Right arrow> And <Ctrl><Left arrow>	None	Move cursor to first character of next word or to first character of previous word. In fixed field: Move cursor to the right or left one cell.
<Shift><Arrows>	None	In variable fields: Select characters (right/left arrows) or lines (up/down arrows), one at a time.
<Tab>	None	Move cursor to next field. In fixed field with drop-down lists displayed: Move cursor forward (to the right) from element name to cell, etc.
<Shift><Tab>	None	Move cursor to previous field. In fixed field with drop-down lists displayed: Move cursor backward (to the left) through cells.
<Page up> And <Page down>	None	Scroll window up or down one "page" (screen) to display content immediately above or below current display.
<Delete>	None	Delete highlighted text, or if no text is highlighted, deletes one character to the right of the cursor.
<Alt><Delete>	None	Delete current variable field.
<Backspace>	None	Delete highlighted text, or if no text is highlighted, delete one character to the left of the cursor.
<Home>	None	Move cursor to beginning of cell.
<Ctrl><Home>	None	Move cursor to beginning of record.
<End>	None	Move cursor to end of cell.
<Ctrl><End>	None	Move cursor to end of record.
<Ctrl><F7>	None	Delete text from cursor to end of cell.
<Alt><F7>	None	Delete word where cursor is located.
<Ctrl><S>	None	Move cursor to next subfield or to beginning of next field.
<Shift><Ctrl><S>	None	Move cursor to previous subfield or to end of previous field.

Save records

Save bibliographic records


Action	
	Display a record or select records in a list, and click Action > Save Record to Online File (<Ctrl><Alt><V>) (must be logged on) or Action > Save Record to Local File (<F4>) (can be logged on or offline).
Notes on results:	
•	Records saved to the online file expire and are deleted from the save file unless you modify or resave them. <ul style="list-style-type: none"> ○ Existing WorldCat records expire after 14 days. ○ Workforms (new records) expire after 28 days. ○ Locked master records are unlocked when they expire.
•	Records saved to the local file do not expire.
•	Re-save an online save file record after taking a final OCLC action to keep it in the online save file.
•	The client automatically saves local save file records after actions.
•	The maximum number of records for both local and online files is 9,999.

Tip: Add My Status to saved records



Assign a free-text My Status to help retrieve a related group of records from the online or local save file or from constant data files.

Action	
1	Display a record or select records in a list, and click Action > Set Status (<Alt><Shift><S>). Or Set a default My Status in Tools > Options > My Status to add the My Status automatically whenever you save a record.
2	Enter a free-text My Status using up to 40 characters of free text. For example, type your name, a date, or a project name.
3	Click OK or press <Enter>.

Delete records from the save file

Action	
	Display a save file record or select records in a list, and click Action > Delete Record ( or <Ctrl><Alt><D>).

Search for specific save file records

Action	
1	Click Cataloging > Search > Online Save File ( or <Ctrl><F3>) (must log on), or click Cataloging > Search > Local Save File ( or <F3>).
2	Enter a search in a Search for box and select an index from the adjacent list, or enter two searches and combine by selecting a Boolean operator.
3	Limit the search by statuses or other criteria.
4	Click OK or press <Enter>.

Find save file records by statuses or by limits only

Action	
1	Click Cataloging > Show > By Online Save File Status (<Ctrl><O>) (must log on) or By Local Save File Status (<Alt><C><H><L>).
2	Select status(es) or limit(s).
3	Click Show Records or press <Enter>.

Tip: Quick way to retrieve save file records

Retrieve all records in the save file and then sort them by columns.

Action	
1	Click Cataloging > Search > Online Save File or Local Save File .
2	Do not enter any terms or criteria in the Search window. Click OK .
3	Sort the list by clicking a column heading to group the records you need together. For example, sort by My Status or by action status.
4	Click OK or press <Enter>.

Save file indexes

Online file index	Description / Search format
Save File Number	Enter number (1 to 9,999).
OCLC Control Number	Indexes 001 (fixed field) and 019. Enter complete number.
Title	Indexes 245 a b f g k n p. Enter one or more words from title, separated by spaces.
URL	Enter complete URL for Web resource. Omit separator characters (. and /). Include or omit http:// .
Used Date (date of last modification or resave)	Enter all 8 digits of date, in format <i>yyyymmdd</i> . Omit hyphens or other separators.
My Status	Enter My Status identifier you assigned.

Local file index	Definition / Search format
Save File Number	Enter number (1 to 9,999).
OCLC Control Number	Indexes 001 a and 019 a. Enter complete number.
Title	Indexes 245 a b f g k n p and 246 a b f g n p. Enter one or more words from title, separated by spaces. Alternative. Combine words with Boolean or or not .
Name	Indexes 100, 110, 111, 130, 700, 710, 711, and 730 (all subfields). Enter one or more parts of name, separated by spaces. Alternative. Combine names with Boolean or or not .
Standard number	Indexes 010 a b z; 020 a z; 022 a y z; and 028 a. Enter all digits of the number.
Holding Library Code	Indexes 049 a. Enter a holding library code.
My Status	Enter the My Status identifier you assigned.

Use local files

When you install the Connexion client, you also install default (empty) local files on your workstation for bibliographic records and constant data.

- DefaultBib.bib.db
- DefaultBibCD.bibcd.db
- Location: X:\Documents and Settings\[user name]\Application Data\OCLC\Connex\Db (X = letter of your hard drive)
- Limitation for each local file: 9,999 records

If needed, use the local file manager to create more local files.

	Action
1	Click File > Local File Manager (<Alt><F><L><F>).
2	Click a button next to the type of local file you want to work with. A check mark designates the default file.
3	Click a button, depending on what you want to do: <ul style="list-style-type: none"> • Configure Paths to create or delete a path name. • Auto Back Up to clear or select automatic back up and a location. • Create to create a new file (type the file name only; the client supplies the correct file extension). • Delete to delete the selected file (cannot delete the default file). • Set as Default to set the selected file as the default. • Authorization to assign a logon authorization and password to the selected file. • Statistics to show the number of records in the file by specific statuses. • Compact/Repair to remove empty space remaining when records are deleted from the selected file or to repair the selected file when you receive erroneous messages that records are in use by another.

Take final actions on records

Interactive. The following sections cover taking a specific action on records immediately while logged on.


Batch process. For instructions on batch processing record actions, see "Batch process WorldCat searches and record actions" below.

Authorization. The final actions you can take on records depend on the cataloging level associated with your logon authorization. See [OCCL Cataloging Authorizations: Record Actions and Upgrades](#) for more information.

Export records

- Exporting records requires no minimum authorization level.
- Before you export the first time, you must create an export destination.
- See client Help or [Setup Worksheet](#) for export setup and options.

To export records:

Action
Display a record or select records in a list, and click Action > Export (or use  or <F5>).
Caution: If exporting to an existing file, the first time you export, the client may prompt you to choose to overwrite or append data already in the file or to cancel and use another file. Your choice persists each time you export in the same logon session until you close and re-open the client.

Notes:

- Records export whether you are logged on or offline unless you set an option in **Tools > Options > Batch** to export in batch.
Tip: Check the Export status for records. If it is **R** (Ready), your option is set for batch export, not for immediate export.
- You can export existing WorldCat records only (records that have OCLC numbers), not workforms (new records not yet added).

Report errors in records


	Action
1	With a record displayed, click Action > Report Error .
2	Complete required fields: OCLC symbol, user name, e-mail.
3	Optional. Select a check box to receive a copy of your report.
4	In the large text box, describe the error. The client automatically attaches a copy of displayed record to your report.
5	Click Report Error . The client sends the report to OCLC quality control.

Print labels

Edit and print labels for one record

- Printing labels requires no minimum authorization level.
- Records must have a call number in order to print labels.

Tip: By default, labels print immediately whether you are logged on or offline. Check the Label status in the record status bar. **R** (Ready) means that your option in **Tools > Options > Batch** is set to batch print labels.

	Action
1	Logged on or offline, display a record and click View > Label (or use  or <F10>). The client extracts information from the record and inserts it in the displayed label: <ul style="list-style-type: none"> • Author from main entry fields 1xx • Title from 245 Ꞥa • Call number based on logon authorization • Input stamp based on 049 Ꞥa
2	Edit the label, if needed, and set parameters for print constants, number of copies, etc.
3	Click Print or press <Enter>.

Print labels for multiple records without editing

Action	
1	Logged on or offline, display a record or select records in list, and click File > Print Label(s) (<Shift><F10>).
2	Optional. Print more than one copy or specify print constants for multiple copies or parts.
3	Click OK or press <Enter>.

Save labels

Print labels to a file, or edit records with label data and then save them:


Action	
Click Tools > Options > Printing , click Label Options , and select the Output to Text File check box. Then print the labels. Or Edit records with content required to produce the labels you want, and then save the records to print labels later. See client Help for more information.	

Take produce and update actions


- Produce and update actions require a minimum authorization level of Full.
- Update holdings to add your OCLC institution symbol to a WorldCat record to indicate that your library holds the item.
- For new records, produce and update actions also add the record to WorldCat (the system assigns an OCLC number). See "Create records and add to WorldCat interactively" and "Batch process WorldCat searches and record actions" below.

Update or delete holdings

To update holdings for a record:


Action	
While logged on, display an existing record, and click Action > Holdings > Update Holdings (or use  or <F8>).	

To delete holdings from a record:

Action	
While logged on, display an existing record, and click Action > Holdings > Delete Holdings (or use  or <Shift><F8>).	

Produce and update

These commands trigger other OCLC services to produce catalog cards or accession lists, depending on your OCLC cataloging profile.

Action	
Display a record, or select records in a list, and click Action > Holdings > Produce and Update Holdings (or use  or <Shift><F7>), or click Action > Holdings > Alternate Produce and Update .	

Use **Produce and Update Holdings** to:

- Receive catalog cards for the receiving catalogs of the first holding library shown in field 049 ʒa of a record.
- Add the record to OCLC MARC Record Subscription file or tape.
- Generate an item on the list from OCLC Accessions List service.

Use **Alternate Produce and Update** to:

- Order extra cards (1-255) for the receiving catalogs of the first holding library in 049 ʒa: Enter the number of extra cards.
- Order cards for all holding libraries in 049 ʒa: Select **All Produce**.
- Order cards for the first holding library in 049 ʒa: Select **Ad Produce**.

Display holdings for a record

Action	
1	Display a record and click View > Holdings .
2	Click Default, All, Regional, or State .
3	Optional. <ul style="list-style-type: none"> • To pop up the institution name for a symbol, move the mouse pointer over the symbol in the holdings list. • To print the displayed list of holdings, click Print.

Launch local holdings maintenance in Connexion browser

- Creating and maintaining local holdings records (LHRs) requires a minimum authorization of Full.
- To check whether a bibliographic record has LHRs attached, see the holdings statement at the top of the record.
Example: *Held by OCL/Local OCL holdings - 12 other holdings*
- Local holdings maintenance is in the Connexion browser interface, which you can open from within the Connexion client.

To open a Connexion browser session for local holdings records:

Action	
1	Display a WorldCat record or a record from the online or local save file.
2	Logged on or offline, click Tools > Launch Local Holdings Maintenance (<Alt><T><L>). The client opens Connexion in the browser interface, and automatically logs you on. After logon, the LHR or list of LHRs displays in the browser screen.
3	Modify the LHR(s).
4	When finished, close the browser window to log off automatically.

Create records and add to WorldCat

About record limits:

- No limits on the number of variable fields or total record length.
- Theoretical limit on the number of characters: Up to 99,999.

- Adding new records to WorldCat requires a minimum authorization level of Full.
- Always search WorldCat before creating a new record and again before adding it to WorldCat to prevent duplicate records.

OCLC Connexion Client Quick Reference

- **Required.** Before creating records offline, define a classification scheme, holding library code, and institution symbol in **Tools > Options > General, Offline Cataloging Options**.
- Create a record from a workform or from an existing record.

Derive a new record from an existing record

Retrieve a WorldCat record that closely matches, or is related to, the item you are cataloging. Use it to derive a workform for a new record:

	Action
1	Display a record, and click Edit > Derive > New Record (<Ctrl><Alt><C>). Options: <ul style="list-style-type: none"> • Select fields to transfer in Tools > Options > Derive Record. • Change the MARC format using the fixed field drop-down list.
2	Click Yes to transfer or No to suppress transferring fixed field values to the new record.
3	Add data to WorldCat using an Update Holdings command. Click the Action > Holdings menu/submenu, and then click: <ul style="list-style-type: none"> • Update Holdings • Produce and Update Holdings • Alternate Produce and Update Holdings If you are not authorized to add records to WorldCat, you can save, print, or export the new record.

Create a record from a workform (MARC template)

Open a workform in a MARC format you select:

	Action
1	Logged on or offline, click Cataloging > Create > Single Record , and then click a MARC format: Books, Computer Files, Continuing Resources, Maps, Mixed Materials, Scores, Sound Recordings, or Visual Materials
2	Add data and edit to complete the record, and then add it to WorldCat. See step 4 in the procedure above for deriving records.

Create records for electronic resources

Automatically extract metadata from an electronic file and insert the data into a workform to create a preliminary record.

	Action
1	Logged on or offline, click Cataloging > Create > Extract Metadata , or press <Alt><C><C><X>.
2	In the Resource box, enter the full URL of a Web page (begin with <i>http://</i> or <i>https://</i>) or the full path and file name of a file on your workstation or a network drive. See a list of file types supported below. Note: File size limit = 50 MB
3	Optional for *.html and *.htm files only: Select the Create multiple records from one Web site check box (also creates records from files linked from the Web page for the supported file types listed below).

	Action
4	Click OK , or press <Enter>. Or If you opted to create records from linked files, select the links from a list the client displays, and then click Start .
5	Check, edit, and add data to records as needed to complete them. When finished, add the new records to WorldCat (see step 4 in the procedure for deriving new records).

File types available are: *.htm or *.html (Hypertext Markup Language), *.pdf (Adobe Portable Document), *.doc (Microsoft Office Word), and *.mp3 (MP3 audio).

Import records

Create records in your local system and import them into Connexion as workforms.

	Action
1	Offline or logged on, click File > Import Records (<Alt><F><I>).
2	Type the full path and file name of the file containing the records you want to import, or click Browse to navigate to the file. Required. Files must be MARC-compatible (for example, files with the extension *.dat).
3	Select Import to Online Save File (must log on) or Import to Local File (logon not required, but requires cataloging settings from Tools > Options > General / Offline Cataloging Options).
4	Optional. Click Options to apply default constant data or assign a My Status, or click Record Characteristics to select a record format and character sets for imported records.
5	Click OK or press <Enter>.
6	Click Yes to delete the original file or No to keep it.
7	A temporary Import Report displays. Print or copy if needed.

Replace master records

A minimum authorization level of Full is required to replace master bibliographic records in WorldCat.

	Action
1	Log on, retrieve the WorldCat record you want to modify, and edit the record.
2	Optional. Click Action > Lock Master Record (<Alt><F8>).
3	Click Action > Replace Record (<Alt><F10> or Replace and Update Holdings (<Alt><F11>). Notes: <ul style="list-style-type: none"> • The system locks the record automatically before replacing, if not already locked, and then unlocks it when the action is completed. • If the record replaced is in the online save file, the system automatically deletes it unless you resave it before you close it.

Batch process searches and actions

Enter WorldCat searches and/or mark records for actions in one or more local files to process all at once in a batch.

Enter WorldCat searches for batch processing

	Action
1	Click Batch > Enter Bibliographic Search Keys (<Alt>).
2	In the Query box, enter a full syntax search as you would in the Command Line of the interactive Search WorldCat window.
3	Click Add or press <Enter>. The search is added to the list.
4	Repeat steps 2 and 3 to enter more searches.
5	Options: <ul style="list-style-type: none"> If you use multiple local files, you can select a file in the Local File list to select another file to store the searches. You can import searches from a text file (*.txt). Click Import and enter the path and file name. To prepare the text file, use a text editor such as Notepad. Type each full syntax search on a separate line.
6	When finished, click Save .
7	When ready, run batch processing. See "Run batch processing" below.

Set actions on records for batch processing

	Action
1	Save records you want to batch process in a local save file. Log off if you are online.
2	Display a record or, if in the local file, select records in a list, and then click one of the following actions on the Action menu: Delete Holdings, Produce, Replace, Submit for Review, Update Holdings, or Export .* Or on the File menu, click Print Label(s).* *Note: Must set option for batch export and/or batch print labels in Tools > Options > Batch . Otherwise, export or print occurs right away.
3	When ready, run batch processing. See "Run batch processing" below.

Remove actions marked for batch from records

Remove the Ready Status from records to remove from batch:

	Action
1	Display a marked record or select records in a local save file list.
2	Click Action > Set Status (<Alt><Shift><S>).
3	Under Remove ready status for batch , select one or more check boxes for actions you want to remove.
4	Click OK or press <Enter>.

Run batch processing

For batch processing, the Connexion client automatically logs on.
Required: To run batch processing, set a general default logon authorization in **Tools > Options > Authorizations** or a file-specific authorization in **File > Local File Manager** (click **Authorization**).

To run batch processing:

	Action
1	Click Batch > Process Batch (<Alt><P>).
2	Select the local file(s) containing searches and actions you want to process.
3	Under Process , click a check box to select searches, record actions, export, and/or label print for processing.
4	Select a processing order in the Bibliographic Processing Order list.
5	Optional. Click Search Options to assign a My Status or apply default local constant data to records downloaded from searches.
6	When ready, click OK or press <Enter>.

Quick batch: Set or delete holdings by entering OCLC numbers

Batch process **Update Holdings, Produce and Update Holdings, or Delete Holdings** by entering only the OCLC numbers of records. You do not have to retrieve the records first before taking these actions.

	Action
1	Click Batch > Holdings by OCLC Number (<Alt><H>).
2	Enter OCLC record numbers in the large text box, one number per line. Or Click Import and enter the path and file name of a text file containing OCLC numbers (each entered on separate lines), or navigate to the file. Recommended limit: No more than 2,500 OCLC numbers per batch
3	Select a button next to the holdings action you want to process.
4	When ready, click OK or press <Enter> to process immediately.

Use non-Latin scripts for cataloging

The client supports the following non-Latin scripts: Arabic, Bengali, Chinese, Cyrillic, Devanagari, Greek, Hebrew, Japanese, Korean, Tamil, and Thai.

Input methods. If the default language of your workstation is not a language that uses the script you need, you must install the language and an input method, such as those provided in Windows 2000 or XP (**Start > Control Panel > Regional Options** or **Regional and Language Options**).

Alternative: RLIN21 keyboards. See instructions in **Getting Started** for installing RLIN21 keyboards for Arabic, Cyrillic, and Hebrew scripts.

Valid characters. Character sets in **MARC 21 Specifications for Record Structure, Character Sets, and Exchange Media, Code Tables** define the scope of valid characters for Arabic, Chinese, Cyrillic, Greek, Hebrew, Japanese, and Korean.

For Bengali, Devanagari, Tamil, and Thai, the client supports Unicode 4.0 characters in these ranges: U+0980 to U+09FF (Bengali), U+0900 to U+097F (Devanagari), U+0B80 to U+0BFF (Tamil), and U+0E01 to U+0E5B (Thai).

OCLC Connexion Client Quick Reference

Guidelines

- Records with non-Latin script data must meet MARC standards.
- Use non-Latin script data only, or romanized (Latin-script equivalent) data only, or both in records.
- Follow guidelines in [ALA - LC Romanization Tables](#) for romanized data.
- Use multiple supported non-Latin scripts anywhere in a record, including within a single field.

Client tools for non-Latin scripts in records

Use the following commands and features to help manage script data:

Edit > Linking Fields > Link or Unlink

Visually links or unlinks non-Latin script fields with equivalent Latin script fields with brackets.

Note: This command is also on the right-click menu in records.

Edit > MARC-8 Characters > Convert to MARC-8 CJK

Automatically converts non-MARC-8 CJK characters to equivalent MARC-8-compliant characters.

Edit > MARC-8 Characters > Verify or Clear

Verifies characters separately from record validation or clears highlights from invalid characters. Unavailable for Bengali, Devanagari, Tamil, and Thai. These scripts are verified when you validate records.

Edit > Transliterate > Arabic or Persian

Automatically transliterates existing romanized (Latin-script equivalent) data in Arabic or Persian records into Arabic script data.

Note: These commands are also on the right-click menu in records.

File > Import Records; click Record Characteristics

Select the MARC-21 (default) or UTF-8 Unicode character set for imported records.

Tools > CJK E-Dictionary

Helps select characters for Chinese, Japanese, and Korean script data.

Tools > Options > Export; click Record Characteristics

Select MARC-8 or Unicode export format (Unicode is required to export records with Bengali, Devanagari, Tamil, or Thai scripts).

Tools > Options > International

Select or clear options for:

- **Data in exported records** — Determine whether to retain all data or Latin script data only or non-Latin script data only in exported records; determine how to sort them.

- **Workforms** — Opt to include paired fields in workforms automatically.
- **Client interface language** — Choose an interface language (Chinese simplified, Chinese traditional, English [default], German, Japanese, Korean, Spanish).
- **Auto-transliterating Arabic or Persian in interactively retrieved WorldCat records** — Opt to automatically transliterate romanized (Latin-script equivalent) data into Arabic script in Arabic or Persian WorldCat records, and select fields you want to auto-transliterate.

View > Align Right

Align Arabic or Hebrew script data in records for display and print.

Note: This command is also on the right-click menu in records.

On right-click menu only—Insert Unicode Control Characters

Insert control characters to correctly display left-to-right multiple-digit numbers and punctuation in Arabic, Persian, and Hebrew records.

Support

OCLC regional service provider

See [provider information](#) on the OCLC Web site.

OCLC support staff

E-mail: support@oclc.org

Or

Within the Connexion client, click **Help > Contact Support** to send an e-mail.

Telephone: 1-800-848-5800 (USA) or +1-614-793-8682

(7:00 a.m. to 9:00 p.m., U.S. Eastern time, Monday–Friday)

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